OCLC works with Teton Data Systems to automatically add and maintain your knowledge base collection data. Get WorldCat records, holdings, and full-text links for content from Teton Data Systems.

Get started

If you need access to Collection Manager (the Metadata tab in the WorldShare interface), follow the steps to Create a Collection Manager account.

An OCLC Cataloging and Metadata Subscription is required for record delivery from the collections listed below. If your library does not have a subscription, see Options for libraries without a cataloging subscription.

Verify your collections have not been manually selected

If your institution has manually selected a collection in full, OCLC will not overwrite your selections. Before the initial load of holdings from your provider, we recommend that you verify that the collection has not been manually selected.

Verify that your collections have not been manually selected

Before the initial load of your collections, please:

2. Navigate to Metadata > Collection Manager and locate the search box.
3. Uncheck My Selected Collections and search for the collection.
4. Once you have returned the collection in a search, perform one of the following:
   - If the collection is selected in FULL: You will need to deselect it. Our system will not be able to overwrite the collection with the title data directly from your provider. If you have holdings set in WorldCat, deselecting the collection will remove these holdings. Holdings will be added after OCLC loads the collection (if WorldCat Holdings is enabled in Institution Settings)
   - If the collection is partially selected to reflect a subset of the titles available in the collections: The system will overwrite your title selections and collection data. If you want to preserve the title selections and collection data before OCLC overwrites it, do so before making a request for your collection to be loaded by OCLC. Within your collection, navigate to Titles > More Actions. Use the option to Download titles in local holdings and choose a format to download a spreadsheet of your title data
   - If the collection is NOT selected: Proceed to the instructions How to request automated collection loading

Note: Once the holdings feed is set up, OCLC will select all applicable collections according to the data received from the vendor.
Request collection loading

Collection names and IDs

There are many collections in the global WorldCat knowledge base. Use the collection data in the table to help you find the relevant collections.

<table>
<thead>
<tr>
<th>COLLECTION NAME(S)</th>
<th>COLLECTION ID(S)</th>
<th>DEMAND-DRIVEN ACQUISITION COLLECTIONS</th>
<th>FREQUENCY PROVIDER SENDS OCLC DATA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stat!Ref</td>
<td>teton.ebooks</td>
<td>No</td>
<td>Weekly</td>
</tr>
</tbody>
</table>

How to request automated collection loading

Either contact your Teton representative, or contact OCLC Support with the following message. Replace [xxx] with your information:

Please load my Teton collections. My OCLC symbol is [xxx]. My Registry ID is [xxx].

See if your collection loaded

We recommend that you wait until your collection is available before you proceed so that all of the settings will be available in Collection Manager.

The amount of time it takes for your titles to be available depends on the timing of your request, how often your provider sends data, when OCLC loads the data, and the place of your institution's data in a queue. The time for the initial loading process varies from about one week to one month.

Caution: Once you have requested to have your collections selected automatically, do not add, delete, or update any of the titles within the collection. If there is an issue with the titles selected or missing from your collection, please contact OCLC Support with examples.

To see if your collection has loaded in the WorldShare interface:

1. Sign in to the WorldShare interface at your library’s WorldShare URL (https://yourlibrary.share.worldcat.org/wms [Replace yourlibrary with your library's identifier]).
2. Navigate to Metadata > Collection Manager. Do one of the following:
   - Navigate to the Activity History and look at the history for your provider. See Collection Manager Activity History for help
   - Search for the collection
Configure institution settings

Institution settings apply across all your collections. Use caution as changes might impact other collections. For complete instructions, see Institution Settings.

Navigate to the institution settings:

1. Sign in to the WorldShare interface at your library’s WorldShare URL. Replace yourlibrary with your library's identifier: https://yourlibrary.share.worldcat.org/wms
2. Navigate to Metadata > Collection Manager > Institution Settings.

OCLC Symbol

Verify that your OCLC Symbol is selected

Collection Manager uses the symbol displayed here to maintain WorldCat holdings and to output records. Verify that your OCLC symbol is selected:

1. Navigate to Institution Settings > OCLC Symbol.
2. Select your OCLC symbol if it is available in the interface but is not selected.
3. Click Save.

Proxy and Authentication

Enter your proxy information

Collection Manager helps you manage patron access to materials by directing off-campus patrons through your proxy server. Collection Manager will prepend your proxy information to catalog links. Enter your proxy information:

1. Navigate to Institution Settings > Proxy and Authentication > Proxy.
2. Select Proxy:
   • None (default)
   • EZproxy
   • III WAM Proxy
3. Base URL
   • EZproxy users: Enter your Base URL. Example of a EZproxy base URL: http://ezproxy.oclc.org/login?url=
   • IIIWAM Proxy users: Enter the Hostname. Example of a III WAM Proxy hostname: sys.lib.proxy.edu
Caution: Do not include a space after the Base URL.

Reports

Enable emailed reports

Reports will be available via email around the time when files of records have been output and/or after there are changes to your holdings in WorldCat. Enable emailed reports:
1. Navigate to Institution Settings > Reports.
2. Select Yes to Receive Email Reports.
3. Enter your cataloging authorization or an admin code. This is a 9-digit number starting with 100. Only one authorization code is needed per institution.
4. Select the Report Types you wish to receive.
   - To find details about the content of each report type, see Understanding emailed reports.
5. Enter the Email Address(es) the reports will be sent to. If you are adding more than one email address, separate each email address with a semi-colon (;).
7. Click Save.

For more information, see Reports.

Provider Settings

Enter your provider-specific identifier for links

Some providers require an ID. Enter your identifier:

1. Navigate to Institution Settings > Provider Settings.
2. Select your provider from the drop-down list.
3. Enter the identifier from your provider.

Choose the instructions that apply to your needs

Get WorldCat MARC records

Record delivery is available both to libraries with and to libraries without an OCLC Cataloging and Metadata Subscription.

Enable MARC record delivery in the institution settings

1. Navigate to Settings > MARC Records.
2. Select Yes for Enable MARC Record Delivery.

Once you enable record delivery, tabs of settings will appear: Customize Records, WorldCat Updates, Record Delivery, Cataloging Partner Options. You can leave the default settings or customize your records. By default, the following will be included in your records:

Customize your record profile (optional)
Define customizations that will apply across your collections in the **Customize Records** tab. For additional information, see [Configure institution MARC Records settings for knowledge base collections](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Use_Collection_Manager_for_content_f…).

**Default and frequently defined record customization**

By default, the following fields and data will be included in your records:

- 049 $a: Holding library code (For example: MAIN)
- 590 $a: Provider Name
- 590 $b: Collection Name

**Frequently defined record customization:**

**Delete Fields:**

- 029

**Add Fields:**

- 945 $a: Transaction Type – New, Updated, Deleted
- 740 $a: Collection-level notes. Note: If you map collection-level notes to a field in your records, remember to add a note within one or more of your collections.

**Knowledge Base Collection 856 Field:**

- Add Subfield: z
- Enter Free Form Text: Click here for access (Your 856 links will include $zClick here for access)

**Enable collection-level record setting**

1. Search for the collection and open it. Expand the **Holdings and MARC Records** accordion.
2. Choose **Use institution setting**: [Your institution settings will be displayed here].

After you enable record delivery in the collection, you will see the following tabs of settings: Customize Records, Record Delivery. You can leave the default settings or configure collection-level settings.

**Configure collection-level settings (optional)**
Define collection-level settings if desired. Listed below are some frequently used settings. For additional information, see [Enable record delivery within your collection](#).

### Configure separate file delivery

Many libraries choose to have their file of records delivered in a separate file. To configure separate file delivery:

1. Click on the **Record Delivery** tab and find the **Delivery File Output** settings. Select **Deliver records for this collection in a separate file**.
2. Enter a name to help you recognize your file. The file name will follow a format such as: metacoll.[XXX].new.D20160214.T210512.[YourFileName].1.mrc

### Exclude records which already have holdings set in WorldCat

This setting acts as a filter to filter out from record delivery titles that you have set holdings on through some process outside of Collection Manager.

By default you will receive a **full set of records** for the titles in the collection. Your initial batch of records will have a record for every title. The default setting is:

- Include new records already held in WorldCat (default)

If you do not want records for items you already have holdings on in WorldCat, you can choose to have those titles withheld from record delivery. Change the setting to **Do not include records already held in WorldCat** and you will only receive records that do not already have your holding attached in WorldCat.

Note: If you choose not to have records output for titles you already hold in WorldCat, we recommend that you change this setting back to "Include new records already held in WorldCat" after you receive your first delivery.

### Troubleshoot MARC record delivery

1. Are the correct number of titles selected in your collections?
   - Once the holdings feed has been processed, the correct number of titles should be selected within one week. Do not select the collection manually unless explicitly directed to do so. Selecting the collections manually will result in a significant delay in processing of your holdings feed.

2. Have you enabled MARC records at the institution level?
   - Navigate to **Collection Manager > Settings > MARC Records** and ensure the **Enable MARC Records Delivery** option is set to **Yes**.

3. Have you enabled MARC record delivery within the collection?
   - Navigate to the collection and expand **Holdings and MARC Records**. Ensure that the **Enable MARC Record Delivery** option is set to **Use institution settings**.

4. Is the delivery frequency for record delivery set to daily?
   - Remember that delivery frequency can be set per collection and this collection-level setting will override the institution-level delivery frequency set under **Collection Manager > Settings**. If you set your collection to Weekly or Monthly record delivery, then they will have to wait for your first delivery. If you change delivery to Daily, an initial delivery is triggered. After receiving this initial delivery, you can then set it to Monthly or Weekly for on-going delivery of records if necessary.
Manage WorldCat holdings

WorldCat holdings maintenance is available only to libraries with an OCLC Cataloging and Metadata Subscription.

1. Navigate to Institution Settings > WorldCat Holdings.
2. Set Maintain holdings in WorldCat to Yes.

The collection-level setting for knowledge base collections will be enabled by default. For complete instructions, see Institution Settings, WorldCat holdings.

Download files

Download your files and records using My Files, located under the Metadata tab in the WorldShare interface. You do not need additional credentials to download records from the WorldShare interface.

See Download files in My Files for complete instructions or follow these basic steps:

1. Sign in to the WorldShare interface and navigate to Metadata > My Files.
2. Click Downloads.
3. Use the options to filter the file list. Click Download to download your file.

Additionally, see Download files with FTP for FTP/sFTP options for downloading files and records.

Use collection data with other services

- Display full-text links and elevate links from a specific provider in WorldCat Discovery
- Deflect lending requests (knowledge base collections)
- Surface your materials in Google Scholar

For more information, see Use collection data with other services.

Find additional support materials

For help, visit us in Collection Manager office hours. Find additional information:

- Understand emailed reports
- Understand record processing
- MARC Record delivery troubleshooting